PX-0518A

Case Clip(s) Detailed Report
Sunday, January 09, 2011, 1:33:21 PM

518-A

0_W3301

📁 **Oliver, Kristy (Vol. 01) - 03/11/2010**   **1 CLIP (RUNNING 00:57:13.200)**

🎬 Could you please state your name for the ...

KOEDIT   **57 SEGMENTS (RUNNING 00:57:13.200)**

1. PAGE 6:18 TO 6:22 (RUNNING 00:00:07.000)

```
        18              Q     Could you please state your name for the
        19      record.
        20              A     Kristy Oliver.
        21              Q     And who are you employed by?
        22              A     Blount Memorial Hospital.
```

2. PAGE 8:24 TO 9:04 (RUNNING 00:00:18.200)

```
        24              Q     -- could you take a moment, please, to
        25      review those 11-numbered topics on Pages 10 and 11,
  00009:01      and the question I'll have once you've reviewed them
        02      is whether you are prepared to testify today on
        03      behalf of Blount Memorial Hospital regarding each of
        04      these topics?
```

3. PAGE 9:05 TO 9:07 (RUNNING 00:00:07.800)

```
        05              A     Yes, I am.  The document does refer to
        06      Punchout, and we do not own or license or use
        07      Punchout.
```

4. PAGE 10:06 TO 10:18 (RUNNING 00:00:30.300)

```
        06              Q     What is your current job title at Blount?
        07              A     I'm Director of Materials Management and
        08      Home Medical Equipment.
        09              Q     And Home Medical Equipment?
        10              A     Yes.
        11              Q     And how long have you had that title?
        12              A     Five years.  I've been over materials for
        13      five years and home medical equipment for two.
        14              Q     What are the responsibilities of your
        15      job?
        16              A     Being Director of Materials Management,
        17      I'm over purchasing, receiving, inventory control,
        18      print shop and OR materials coordinator as well.
```

5. PAGE 11:14 TO 12:12 (RUNNING 00:01:02.500)

```
        14              Q     What software does Blount currently
        15      license from Lawson?
        16              A     We use -- I don't -- I'm not sure I -- I
        17      mean, we -- our Human Resources Department, our
        18      Accounting and Finance Department and Materials
        19      Management use the suites of Lawson.
        20              Q     Okay.  And what suite does the Materials
        21      Management group use?
        22              A     The procurement suite with the
        23      Requisitions Self-Service.
        24              Q     Okay.  What procurement modules are
        25      included within the supply chain management or
  00012:01      procurement suite?  For example, does that include
```

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```
02              Q      Did Lawson generate a Request for
03      Proposal when it was considering switching from the
04      Infinium system?
05              A      Yes.
06              Q      And what companies was the Request for
07      Proposal issued to?
08              A      McKesson, Cerner PeopleSoft and Lawson.
```

9. PAGE 14:23 TO 16:08 (RUNNING 00:01:36.700)

```
23              Q      Were you responsible for compiling the
24      Request for Proposal?
25              A      There was a team that put in what needs
00015:01      we would have in the software and then our IT
02      department compiled the RFP.
03              Q      Were you involved in generating a list of
04      the functionality that you would need?
05              A      Yes.
06              Q      And what specific functionality were you
07      interested in having in software that you would use
08      for procurement?
09              A      We wanted to be paperless.  We wanted
10      inventory control to auto generate the orders based
11      on what had been issued and received in the -- in our
12      inventory.  We wanted an Item Master List to help
13      control costs, and we wanted a contract management
14      system to help us manage our contracts.
15              Q      When you say an Item Master List, what
16      are you referring to?
17              A      Items that -- that people order
18      frequently on a frequent basis for them to be able to
19      go in.  They don't have to remember the vendor, the
20      unit of measure that we need to order the item by.
21      All that information is stored for them in Lawson,
22      and they can go in there and search by several
23      different things through the search catalog-in
24      Requisitions Self-Service and add those items to a
25      shopping cart and checkout and then that rolls down
00016:01      to the purchasing folks, and they generate the
02      purchase orders and send out the orders.
03              Q      Now you're talking about the Item Master
04      List that's currently -- you're referring to the Item
05      Master List that's currently in the Lawson Software?
06              A      Yes.
07              Q      That's used by Blount today?
08              A      Yes.
```

10. PAGE 17:04 TO 18:03 (RUNNING 00:01:44.000)

```
04              Q      Do you know approximately how many items
05      are currently in the Item Master?
06              A      I think about 8,000.
07              Q      And do you know approximately how many
08      vendors are in the Item Master?
09              A      I do not.
10              Q      Can you give me some examples of the
11      largest vendors that Blount uses that are in the Item
12      Master?
```

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        13              A     Seneca that is our med search -- our main
        14       med search distributor that we -- we get the majority
        15       of our medical supplies through.  Cardinal is a large
        16       vendor that's also in Lawson.  The divisions of
        17       Johnson & Johnson, which would be Ethicon, Cordis.
        18              Q     What type of information about each item
        19       is contained in the Item Master?
        20              A     You have -- the ANSI format unit of
        21       measure is in there, a description of the item, the
        22       manufacturer item number if there's a separate vendor
        23       item number, the manufacturer description, and
        24       there's a -- we assign a purchasing class and an
        25       inventory class if that's applicable as well.  That's
 00018:01       stored in there, and the cost of the item, and how
        02       many is in each unit of measure; for example, six in
        03       a box or ten boxes in a case.
```

11.   PAGE 18:04 TO 18:09 (RUNNING 00:00:11.000)

```
        04              Q     Do any of the items have images
        05       associated with them?
        06              A     Not at this time.
        07              Q     Do you intend to eventually include
        08       images in the Item Master?
        09              A     Hopefully, yes.
```

12.   PAGE 19:08 TO 19:22 (RUNNING 00:00:51.900)

```
        08              Q     Now, does the system as it's configured
        09       at Blount, the Lawson Requisitions Self-Service
        10       system, include a functionality that allows a user at
        11       Blount to generate one or more purchase orders from a
        12       single requisition?
        13              A     Yes.
        14              Q     Does it also include a functionality that
        15       allows a user to select and search for particular
        16       items based on the item description within --
        17              A     Yes.  If they go into the search catalog,
        18       there's -- you can do an express search, which is
        19       just by the item number only.  You have to go to the
        20       search catalog to be able to search based on either
        21       manufacturer item, description or anything like that.
        22       That is more of an advanced search.
```

13.   PAGE 19:23 TO 20:07 (RUNNING 00:00:24.600)

```
        23              Q     And within the advanced search
        24       functionality, is there the capability for a user at
        25       Blount to search both by manufacturer name and an
 00020:01       item description?
        02              A     No.  It would have to be one or the
        03       other.  Not at the same time.
        04              Q     Does it have, like, a bouillon capability
        05       of putting in a manufacturer name and then a space
        06       and then an item description so that it searches --
        07              A     Not that I'm aware of.
```

14.   PAGE 22:25 TO 23:02 (RUNNING 00:00:05.700)

```
        25              Q     Okay.  Does -- are there -- are you
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00023:01        familiar with the term UNSPSC?
      02              A     No.
```

15. PAGE 23:03 TO 26:16 (RUNNING 00:03:46.600)

```
      03              Q     Is there the capability for a user at
      04        Blount to search by category?
      05              A     Our purchasing classes and inventory
      06        classes -- how we have it categorized per my -- the
      07        example I gave with catheters, every catheter that we
      08        have in the Item Master List has a purchasing class
      09        of c-a-t-h for cath, and they can search based on
      10        that.  Gloves are in there as gloves.  Laboratory
      11        item are in there as lab.  Urology items are in there
      12        as u-r-o.
      13              Q     Okay.  So you can search by category in
      14        the sense that if you type U --
      15              A     Our own purchasing classes that we set up
      16        they are unique to us.
      17              Q     You created your own custom made
      18        categories --
      19              A     Yes.
      20              Q     -- that would allow a user to search by
      21        category?
      22              A     Yes.
      23              Q     And what kind of assistance did Lawson
      24        provide to Blount in creating the Item Master and all
      25        the information in it?
00024:01              A     They simply provided us a template
      02        spreadsheet with the fields that Lawson would
      03        require, and then we manually built all our items
      04        during the implementation phase and then provided the
      05        spreadsheet to Lawson, and they uploaded it or
      06        downloaded.
      07              Q     When you say that they -- they uploaded
      08        it, you mean Lawson uploaded it?
      09              A     Yes.  We had a consultant on-site during
      10        the implementation phase during particular times
      11        during implementation, and we would provide her with
      12        the information she needed, and we would send her the
      13        spreadsheet, and then she would put it in the system.
      14              Q     Was that -- that was a consultant who was
      15        working here at Blount?
      16              A     Yes, and she was an employee of Lawson.
      17              Q     What was her name?
      18              A     Katrina Rice.
      19              Q     And how long was Ms. Rice on-site here at
      20        Blount?
      21              A     Off and on for a seven-month period.  She
      22        would come and be here for, you know, two weeks, and
      23        then be gone for two weeks while we would work on the
      24        categories that she was needing us to finish, and
      25        then she would come back.
00025:01                    So it was sporadic over a seven-month
      02        period.
      03              Q     Was that in the second half of 2008?
      04              A     Yes.  That would have been from July 2008
```

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```
05        through January 2009.
06             Q     And can you describe for me at a high
07        level the types of activities or assistance that
08        Ms. Rice was providing while she was here at Blount?
09             A     Mostly providing the templates, and if we
10        had questions as to what the field they were
11        needing -- you know, for example, if we didn't
12        understand what the manufacturer number was, she
13        would explain to us the type of data that she was
14        needing in the spreadsheet to make the Item Master
15        List accurate.
16                    She helped in testing and training as
17        well.
18             Q     What kind of assistance did she provide
19        with testing?
20             A     They provided us generic test scripts
21        to -- so that we could get the test system set up and
22        train as well.
23             Q     Did Lawson provide Blount with scripts on
24        how to use Requisitions Self-Service?
25             A     Yes.
00026:01       Q     And did Lawson provide Blount with
02        scripts on how to create a requisition for a
03        particular item within Requisitions Self-Service?
04             A     Not a particular item, but how you would
05        do it, and then we would pick one of the items we had
06        set up, but they did not specify an item in their
07        test script.  It could be whatever item we chose to
08        pick.
09             Q     Did the test scripts provided by Lawson
10        include information on how to search within
11        Requisitions Self-Service?
12             A     Yes.
13             Q     Did the test scripts provided by Lawson
14        to Blount include information on how to generate
15        purchase orders?
16             A     Yes.
```

16. PAGE 26:17 TO 27:03 (RUNNING 00:00:40.000)

```
17             Q     Did the test scripts provided by Lawson
18        include information on searching for vendors within
19        the Item Master?
20             A     Not -- not -- not searching for vendors
21        within the Item Master, no, but searching for
22        vendors -- if you were at the Requisitions
23        Self-Service, you were doing a special item and you
24        needed to find a vendor that you were wanting to
25        order an item that wasn't in the Item Master List --
00027:01       you were ordering that as a special item -- the test
02        scripts explained how to find a vendor when you were
03        ordering something not in the Item Master List.
```

17. PAGE 27:04 TO 28:04 (RUNNING 00:01:06.500)

```
04             Q     You did mention earlier that -- you
05        testified earlier that Ms. Rice actually loaded in
06        items into the Item Master; is that correct?
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```
07                    A     Yes, sir.  Sorry.  I nodded.
08                    Q     Thank you.
09                          Now, can you describe for me exactly what
10          types of items she loaded into the Item Master?  Was
11          it all the information that was in the Item Master?
12                    A     Yes.  Yes, all of our inventory and
13          non-inventory items that we provided to her via the
14          spreadsheet.
15                    Q     All of that information was loaded by
16          Ms. Rice into the Item Master that Blount uses?
17                    A     We have -- since gone live, we have added
18          items ourselves, but during the implementation phase
19          the original Item Master List was set up, she did --
20          she loaded those items, and since then, we load our
21          own.
22                    Q     So you went live, was it, January 1st,
23          2009?
24                    A     Yes.
25                    Q     So the day that the Item Master and
00028:01    Requisitions Self-Service went live at Blount that
02          Item Master and all the information in it had been
03          loaded by Ms. Rice for Blount?
04                    A     Yes.
```

18. PAGE 29:12 TO 29:19 (RUNNING 00:00:18.900)

```
12                    Q     Okay.  Now, who makes the decisions about
13          what non-stock items to include in the Item Master?
14                    A     I do, in addition to our contract and
15          license purchasing manager based on the frequency of
16          ordering.
17                          If we see an item is being ordered
18          frequently, we try to get that item added into our
19          Item Master List.
```

19. PAGE 34:06 TO 34:08 (RUNNING 00:00:10.000)

```
06                    Q     Can users at Blount create requisitions
07          through the requisitions module?
08                    A     No.
```

20. PAGE 34:09 TO 34:15 (RUNNING 00:00:13.000)

```
09                    Q     So the only way that a user at Blount can
10          create a requisition is through the Requisitions
11          Self-Service module?
12                    A     Yes.  The only people that have access to
13          the standard Requisition module is the purchasing
14          agent, but we never use it, but we do have access to
15          it if needed.
```

21. PAGE 35:12 TO 35:15 (RUNNING 00:00:12.900)

```
12                    Q     Does the Item Master that Blount
13          maintains include generally equivalent items like,
14          for example, similar catheters that are available
15          from different vendors?
```

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22. PAGE 35:18 TO 35:18 (RUNNING 00:00:00.500)

```
        18                  THE WITNESS:  Yes.
```

23. PAGE 36:20 TO 37:11 (RUNNING 00:00:50.000)

```
        20          Q     And you mentioned that you viewed demos
        21      of the system?
        22          A     Yes.
        23          Q     In what form was that demo provided to
        24      you from Lawson?
        25          A     They came on-site and showed us the demo
 00037:01      of the system.  I assume they were logged in via the
        02      Internet to show us test demo systems.
        03          Q     After you informed Lawson that you were
        04      interested in purchasing their software, what was the
        05      next step in the process of actually signing a final
        06      contract?
        07          A     Contract negotiation for pricing, legal
        08      review of the verbiage in the contract, and then
        09      establishing a timeline for the implementation and
        10      determining the Lawson consultants that would be
        11      coming on-site.
```

24. PAGE 37:23 TO 38:24 (RUNNING 00:01:18.600)

```
        23          Q     Who was Ms. Rice's primary contact here
        24      at Blount?  Who was she working with at Blount?
        25          A     Me.
 00038:01          Q     And what kind of interaction did you have
        02      with her?
        03                In other words, what kind of work were
        04      you guys involved with during those seven months that
        05      she was present here?
        06          A     Going back to the spreadsheets that I
        07      referred to earlier, making sure that the data was
        08      loaded correctly in those and that, you know, we were
        09      meeting the needs that -- and providing the
        10      information for the required fields that Lawson has
        11      and then testing once that information was loaded in
        12      the system.
        13          Q     In addition to licensing software from
        14      Lawson, did Blount also agree to any sort of
        15      maintenance or sign a contract so that Lawson would
        16      provide maintenance for that software?
        17          A     Yes.
        18          Q     And what kind of maintenance does Lawson
        19      provide to Blount for the software it licensed?
        20          A     They provide technical support.  They
        21      also provide -- they will log-in to our servers and
        22      load our patches and help -- you know, help with any
        23      problems that we have through our service and
        24      maintenance agreement with them.
```

25. PAGE 38:25 TO 39:10 (RUNNING 00:00:29.000)

```
        25          Q     Do you have any assistance on-site from
 00039:01      Lawson consultants?
        02          A     No.
```

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27. PAGE 42:07 TO 43:15 (RUNNING 00:01:26.000)

```
    07              Q     And who trained you on those test scripts
    08         that were provided by Lawson?
    09              A     Katrina.
    10              Q     And she also trained the other Super
    11         Users you called them?
    12              A     Yes.
    13              Q     Are they called Super Users because they
    14         are frequent users of the system?
    15              A     Yes, and we trained the trainer.  She
    16         trained us, and we trained everybody else.
    17              Q     So she's the original trainer?
    18              A     Yes.
    19              Q     She trains you, and then you train --
    20              A     All 700 through -- all the rest of them.
    21              Q     How many people have access to the
    22         Requisitions Self-Service system at Blount?
    23              A     I think we have -- we have about 600
    24         approved requisition users.
    25              Q     So I assume that not all those people are
00043:01         in the Materials Management group?
    02              A     No.
    03              Q     What other groups of employees at Blount
    04         have access to Requisitions Self-Service?
    05              A     Each department will have anywhere from
    06         one to, you know, ten people even -- that have access
    07         to do ordering for their area.  All the nurses -- I
    08         say that.  Most of the nurses have access to be able
    09         to go in and order items.  Some of our nursing
    10         requisitioners can just order from our inventory
    11         storeroom.  They don't have access to order any
    12         non-stock items direct or any special items that
    13         aren't in the Item Master List.  That depends on how
    14         their record is set up in Lawson for what they --
    15         their -- they can do.
```

28. PAGE 44:15 TO 44:21 (RUNNING 00:00:21.800)

```
    15              Q     Okay.  Could you turn, please, to B-17.
```

📄 **PX0225-0013 - PX0225-0013**

```
    16         Do you see there's a document entitled here scenario
    17         log for configuration acceptance testing?
    18              A     Yes.
    19              Q     And handwritten at the bottom it says
    20         Lawson test scripts?
    21              A     Yes.
```

29. PAGE 46:20 TO 47:04 (RUNNING 00:00:17.000)

```
    20              Q     Okay.  Now the create requisition through
    21         RSS is that a script that describes how to create
    22         requisitions through Requisitions Self-Service?
    23              A     Yes.
    24              Q     And that's a test script that was
    25         provided by Lawson to Blount?
00047:01              A     Yes.
```

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```
11              A      Yes.
12              Q      Is this a list, to your understanding, of
13      the requirements that -- the requirements that Blount
14      had included in its Request for Proposal, and then
15      the chart next to each requirement indicates whether
16      Lawson is capable of fulfilling that requirement?
17              A      Yes.
18              Q      Okay.  If you turn to page L83406, it's
```

📄 PX0226-0048 - PX0226-0048

```
19      Page 41 of the document.  Do you see under the
20      section requisitioning there is number ten at the
21      bottom of the page?
22              A      Yes.
23              Q      And it states:  Allows users to place
24      stock, non-stock and non-catalog items from multiple
25      sources on one requisition?
00054:01              A      Yes.
02              Q      Was that a functional requirement in the
03      Request for Proposal that Blount issued to Lawson?
04              A      Yes.
```

37. PAGE 54:05 TO 54:17 (RUNNING 00:00:45.100)

```
05              Q      And is that a function that's included in
06      the software that Lawson provided to Blount?
07              A      No -- I mean, we don't allow them to go
08      out to a vendor catalog.  The source is -- they can
09      order stock and non-stock and put it on the same
10      requisition, but it all has to come from our Item
11      Master List or a direct, but they could still put --
12      or a special, maybe even something that's not in our
13      Item Master List.  They could still put an inventory
14      item, a non-stock item that's in the Item Master List
15      as well as a special item that is not in the Item
16      Master List all those -- all three could be on one
17      requisition.
```

38. PAGE 54:18 TO 54:24 (RUNNING 00:00:23.900)

```
18              Q      So to clarify, a user at Blount using
19      Lawson's Requisitions Self-Service can create a
20      requisition for multiple non-stock items that are
21      generally equivalent yet come from different vendors
22      and then create -- and create purchase order from
23      that one requisition?
24              A      Yes.
```

39. PAGE 56:22 TO 57:21 (RUNNING 00:01:35.000)

```
22              Q      Can you take a look, please, at Page 51.
```

📄 PX0226-0058 - PX0226-0058

```
23      Functional requirement four.
24              A      Yes.
25              Q      It says:  Quote, manages price catalogs,
00057:01      purchase orders, purchase order confirmations and
02      invoice transactions.  Can you describe for me what
```